



## Class/Organization Information Sheet

### **NEW Officer Resources Website**

The Office of Campus Activities has created a new website with resources for officers of classes and organizations. Please visit the website at <https://www.upstate.edu/campus-activities/student-orgs/officerresources.php> for additional information including all the following information and frequently used forms!

### **Presence**

All student organization events should be “checked in” via the Presence Check Point app. This will be the system utilized to review attendance for budget/event planning for the 2020-2021 academic year. Student organizations are also responsible for submitting their events to the Presence site to be on the calendar of events. If you have not yet attended a Presence training, please stop by the Office of Campus Activities (OCA) to be instructed on how to submit your events and/or use the app – please plan accordingly to get trained. Organization leaders should download the Presence App and the CheckPoint App from the App Store. The CheckPoint App will be the source for your “pin” for checking in students at your event. The Upstate Presence site: [upstate.presence.io](http://upstate.presence.io)

### **Event Approval/Reserving Rooms**

Effective, January 2020, the event approval/room reservation process has transitioned to a two-step online process. All student classes or organizations should follow the following procedure for requesting approval and reserving room space for upcoming events – both on and off-campus events:

Step I: Submit “Student Organization & Class Event Request through the following link: <https://forms.gle/wLCckcdWXeoLxNM06>

- This form must be completed for event approval
- This is NOT the room reservation request – rooms will be requested in Step II
- You will be notified by email from [campact@upstate.edu](mailto:campact@upstate.edu) when the event is approved.

Step II: Submit Room Request through online reservation system at the following link: <https://25live.collegenet.com/pro/upstate>

- Sign In with your Upstate credentials in the 25 Live website
- Click “Create Event” button in center of screen after logging in
- Fill out required information making sure information matches your event information in Step I
- Location is not required – a room can be assigned based on information provided
- Requestor will be notified by email with a confirmed room reservation when your room request is approved
- Room request is for on-campus locations only!

### **Reimbursement Process/Checks to Vendors**

Organization reimbursements are processed via the Check Request Form. The form must be fully filled out, be signed by the organization president, treasurer and the individual being reimbursed. Attached to the form must be an itemized original receipt of the expense. The receipt must show that the amount to be reimbursed has been “paid”. A credit card receipt without the accompanying itemized/detailed receipt is not acceptable. We also do not recommend organizations pay cash as there is less of a payment paper trail. Please plan and expect a minimum of one week for reimbursement to be processed.

If you would like to request a check to a business for payment, please attach a detailed invoice to the check request form and submit your form a minimum of one week prior to need.

### **Tax Exempt Forms**

USG is exempt from sales tax and as such does not reimburse for the payment of tax. Tax exempt forms are available from the CAB Information Center for individuals purchasing items on behalf of a student organization. When you request the form the student assistant at the Information Center will need the following information: your name; the organization using the form and the vendor where the form will be used. We are required to track that information for auditing purposes.

### **Gratuities**

USG allows a maximum of \$10 for delivery gratuity regardless of total order cost. If additional gratuity is paid, it must come from fundraised monies.

## **USG Meeting Attendance/Organization Budget Reports**

All student organizations are required to have an executive board member attend at least two meetings/semester. Leaders of multiple organizations are only able to “sign in” for one organization each meeting. Organizations not meeting the attendance requirement may have their organization budget frozen until the attendance requirement is met.

Organization budget reports are distributed at the USG General Body meetings held the first Wednesday of each month. If you, or a member of your organization, do not attend the meeting, all reports not picked up will be available at the CAB Information Center the day after the meeting.

## **Programming**

USG requires all organizations sponsor at least one event of educational/cultural/recreational value to the Upstate community/semester.

## **Fundraising**

If your organization is planning to do a fundraising event or sale, the following is the procedure:

(1) All fundraising events/sales must have pre-approval. Please fill out the Fundraising Proposal Form and submit it to the Campus Activities Office a minimum of two weeks prior to the proposed start date. There may be no further planning or publicity for the fundraiser until after the Fundraising Proposal is approved. If your fundraiser is benefitting a charitable organization outside of Upstate, this must be noted on the Fundraising Proposal form and on all marketing materials. SUNY requires this in order for us to allow you to donate fundraised funds.

(2) If space is required for your event/sale, please follow the guidelines for reserving rooms/planning events.

(3) If you are planning to use the word “Upstate” or the Upstate logo, please note that approval from the Marketing Department is required. Please submit your proposed design via email to the Office of Campus Activities at [campact@upstate.edu](mailto:campact@upstate.edu) and the OCA will get approval from Marketing.

(4) All funds collected from the fundraiser must be deposited into your class/organization account no later than 2 business days following the conclusion of the fundraiser. Please note that you may not pay for fundraiser expenses from the monies collected. All monies collected must be deposited and then expenses reimbursed via the Check Request process. Also please note that no funds may be collected or paid via another bank account, via PayPal, Venmo or other financial online company. Should an organization have a fundraiser with items for sale of \$15 or more, please contact the OCA to request use of the hand-held credit card machine. All checks should be made payable to Student Faculty Association.

(5) Within 72 hours of the conclusion of the fundraiser, the Fundraising Report Form must be filled out and submitted to the OCA. This form will list the costs of the fundraiser, monies raised and require a brief review of the fundraising event.

## **Gift Cards**

SUNY Upstate Medical University prohibits the purchase of gift cards from USG funds.

## **Duplication/Photocopies of Flyers**

Duplication of event flyers or materials is available through the OCA. Please fill out the Request for Duplication form and email the duplication-ready flyer (PDF format only) to [campact@upstate.edu](mailto:campact@upstate.edu) to be duplicated. Publicity can be duplicated in two sizes – flyer (8.5x11) or poster (11x17) and in color or black/white. 3 business days are required for 50 flyer and/or 25 poster or less copies and 7 business days are required for larger quantities.

## **Shuttle Bus Transportation**

The Office of Campus Activities can assist you with planning for shuttle bus transportation for your class/organization event. Please visit the office for additional information and costs for your trip. Please plan accordingly and allow for a minimum of 2-3 weeks prior to your trip.

## **Paper Products/Eating Supplies**

Plates, cups, napkins, forks, knives and spoons are supplied by USG for class/organization events. Please fill out the Request for Eating Supplies form and order supplies a minimum of 3 days before the event.

## **Organization Recognition Form/Officer Transition**

At any time that an organization transitions officers an updated Organization Recognition Form must be submitted to the OCA. All outgoing officers are also responsible for taking the time to meet with the new officers and reviewing organization business and all organization policies on this sheet.

**Please Note: All forms are available at the Office of Campus Activities, Suite 202 of the CAB, or at the CAB Information Center.**

**If you should have any questions, please don't hesitate to contact the staff in the Office of Campus Activities. The office is located in Suite 202 of the CAB, by email at [campact@upstate.edu](mailto:campact@upstate.edu) or by phone at (315) 464-5618. This document updated 1/20.**